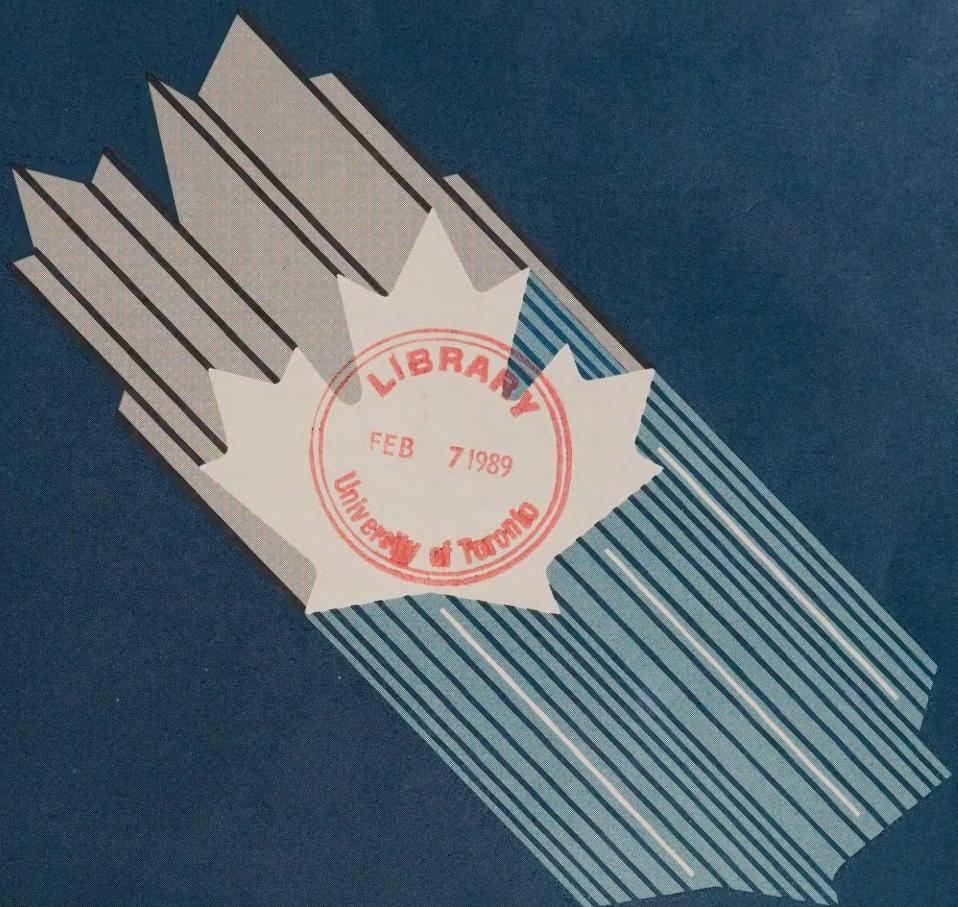


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INDUSTRY PROFILE



Industry, Science and
Technology Canada

Industrie, Sciences et
Technologie Canada

On- and Off-highway Medium/Heavy-duty Trucks

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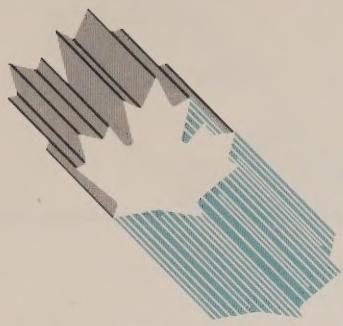
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INDUSTRY

PROFILE

ON- AND OFF-HIGHWAY
MEDIUM/HEAVY-DUTY TRUCKS091
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FOREWORD

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In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to survival and growth. This Industry Profile is one of a series of papers which assess, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological and other key factors, and changes anticipated under the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the papers.

The series is being published as steps are being taken to create the new Department of Industry, Science and Technology from the consolidation of the Department of Regional Industrial Expansion and the Ministry of State for Science and Technology. It is my intention that the series will be updated on a regular basis and continue to be a product of the new department. I sincerely hope that these profiles will be informative to those interested in Canadian industrial development and serve as a basis for discussion of industrial trends, prospects and strategic directions.

Introduction

In broad terms, the automotive industry in Canada includes the manufacturers of motor vehicles (passenger cars, trucks, buses and specialty vehicles), motor vehicle parts and tires and tubes for use as original equipment in the assembly of motor vehicles as well as in the aftermarket. Automotive production is directly linked to many other key industries in Canada: iron and steel, fabricated metals, aluminum alloys, rubber, plastics, textiles, glass and chemicals.

In 1986, this wide range of automotive activities accounted for some 16 percent of total Canadian shipments of manufactured products, and approximately 44 percent of the total of manufactured exports (fabricated materials and end products) to the United States. In 1986, automotive shipments reached almost \$41 billion*, composed of \$25.1 billion in automobile, truck and bus assembly, \$12.2 billion in parts, \$1.8 billion* in specialty vehicles and in excess of \$1.8 billion* in tires and tubes. In the same year, total employment reached some 148 800* persons, with 49 800 engaged in automobile, truck and bus assembly, 16 600* in specialty vehicle production, 68 400 in parts production and an estimated 14 000* in the manufacture of tires and tubes.

In addition to on- and off-highway medium/heavy-duty trucks, profiles have been prepared covering:

- Automotive Parts
- Automotive Tires and Tubes
- Buses
- Light Motor Vehicles
- Specialty Vehicles

1. Structure and Performance

Structure

The medium/heavy-duty truck industry consists of manufacturers mainly engaged in assembling cabs and chassis for the largest highway freight haulers; off-highway haulage vehicles for the construction, mining and forestry industries; and special-purpose products, such as concrete mixers. Truck-trailer and body manufacturers, which provide a customized product mounted on chassis provided by truck manufacturers, are covered in the Specialty Vehicles Industry Profile.

In 1986, the medium/heavy-duty truck industry employed 3630 persons in the production of 19 637 vehicles, with a value of \$1.5 billion. More than half of the shipments were exported to the United States. Imports, largely from the United States, represented close to half the domestic market. A significant portion of truck production occurs outside the automotive corridor in southern Ontario. Of the eight establishments in Canada, four are located in Ontario, one is in Quebec and three are in British Columbia. The industry is particularly important to British Columbia, where the three establishments constitute the province's total vehicle-assembly industry.

* ISTC estimate

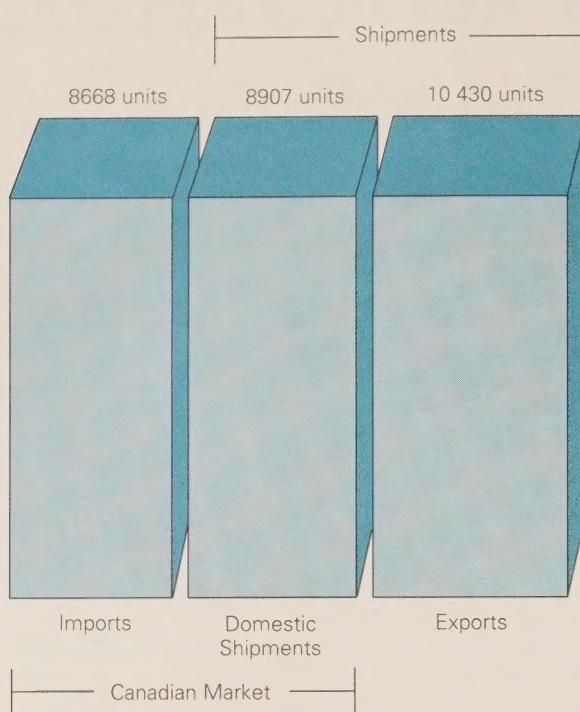
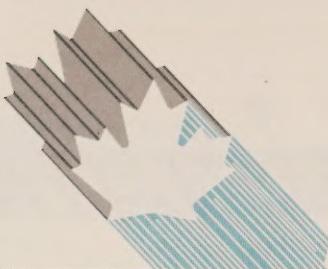
Minister

Canada



Industry, Science and
Technology Canada

Industrie, Sciences et
Technologie Canada



*Imports, Exports and Domestic Shipments
1986*

Note: Data are for on-highway trucks only.

The on- and off-highway vehicles are two distinct sub-sectors of the truck industry. The on-highway sub-sector is confined to one product area, specifically Class 8 trucks, defined as heavy-duty highway freight haulers over 16.76 tonnes (33 000 lb.) gross vehicle weight. This sub-sector, which employed 3230 persons in 1986, consists of four subsidiaries of American companies — Freightliner of Canada Ltd. of Burnaby, British Columbia; Paccar Canada Ltd. of Ste-Thérèse, Quebec; Navistar International Corporation Canada of Chatham, Ontario; and Mack Canada Inc. of Oakville, Ontario — in addition to one wholly owned Canadian company, Western Star Trucks Inc. of Kelowna, British Columbia.

These manufacturers operate under the 1965 Canada-U.S. Automotive Products Tariff Agreement (Auto Pact), which allows duty-free trade in new vehicles and original equipment parts, conditional on the achievement of certain Canadian performance criteria. Canadian producers assemble a limited range of models which are also assembled in larger plants in the United States. The Auto Pact has strongly influenced the pattern of trade. Of the 19 337 units produced in 1986 (net sales value of \$1.3 billion), approximately 10 430 vehicles were exported to the United States (54 percent of shipments). At the same time, some 8668 units were imported, largely from the United States (49 percent of the domestic market).

In contrast, the off-highway sub-sector is much smaller and produces more specialized vehicles. This sub-sector, which employed an estimated 400 persons in 1986, consists of two wholly owned subsidiaries of U.S. firms (Wabco Haupack Division of Dresser Canada of Paris, Ontario, and V.M.E Equipment of Canada, Guelph, Ontario) and one British-owned firm (Pacific Truck & Trailer Ltd. of Vancouver, British Columbia). These firms are not limited to any one class of vehicle but, instead, have the capacity to produce a range of haulers for the construction, mining and forestry industries with payloads ranging from 20 tonnes to more than 200 tonnes. They not only assemble, but also undertake application-oriented research and development.

The sub-sector operates under the Off-highway Vehicle Duty Remission Order which provides the same benefits and imposes the same conditions as the Auto Pact. In contrast to the on-highway sub-sector, there are practically no export sales to the United States and imports are minimal. This is due to the fact that production is geared to specific resource-based projects around the world, mostly in developing countries. Consequently, of the estimated 300 units (net sales value of \$224 million) produced in 1986, almost all were exported to overseas markets.

Performance

The growth of the medium/heavy-duty truck industry peaked in the late 1970s. In the 1973-80 period, both the on- and off-highway truck sub-sectors were robust due to the expansion of resource-based industries around the world. For example, North American retail sales of Class 8 trucks reached a high of 174 000 units in 1979, as compared to 115 000 units in 1986. The industry, however, was dealt a severe blow in the 1981-82 recession when production declined by more than 50 percent, and has never fully recovered. Since 1983, there has been modest recovery, but production is still at only 78 percent of the 1979 level. Decreased performance can be attributed to the international debt crisis which has significantly constrained sales to the developing countries, increased import competition, and led to a restructuring of the North American economy, which has resulted in a lower demand for trucks. Furthermore, North American manufacturers, since the early 1980s, have been facing increased international competition for the remaining market.

Canadian production of on-highway trucks, which is confined to Class 8 vehicles, has been averaging 15 180 units over the last five years, as compared to just under 30 000 units prior to 1980. Of this amount, some 8767 vehicles are exported annually to the United States. The Canadian market of 12 400 units is supplied by domestic production and 6000 imported units. Overseas imports have been taking an increasing share of the Canadian market as a result of European companies following a strategy of purchasing interests in U.S. corporations during downcycles (i.e., Renault/Mack and Mercedes Benz/Freightliner) or forming strategic links (GM/Volvo).

Similarly, the off-highway truck sub-sector has shrunk significantly because of a protracted softening of markets. Until the early 1980s, there were five Canadian manufacturers of off-highway mining and construction trucks. Since overseas markets collapsed and because significant, major new markets have not developed in North America, three Canadian operations dropped their off-highway product line by 1984: General Motors Diesel Division, Unit Rig and Equipment Company and Caterpillar Tractor Company. Two of the remaining companies — V.M.E (formerly Euclid) and Wabco Haulpack — export a significant portion of their production to offshore markets. The Pacific Rim represents an important market for Pacific Truck & Trailer, which manufactures Class 8 logging trucks.

While the Canadian on-highway truck sub-sector has been competitive within its market segments vis-à-vis U.S. operations, it will have to make significant adjustments in the near future in order to maintain its share of the North American market and to regain a foothold in developing countries. Basically, the industry is facing increasing competition from Europe, Japan and Latin America at a time when North American markets are expected to remain flat. In order to move inventories and maintain or increase market share, truck manufacturers have been cutting prices. This has led to an erosion in the profit margins of all truck manufacturers and has put further pressure on the industry to reduce costs through plant rationalization, productivity improvement, or both.

The basic strategy of all Canadian truck manufacturers in a highly competitive market is to trim costs, round out their product lines through imported vehicles and parts and, finally, to focus their resources on those areas where they have a competitive advantage.

2. Strengths and Weaknesses

Structural Factors

The Canadian truck industry largely consists of assembly operations. What has given Canadian on-highway producers a competitive advantage is their access to the whole North American market, as a result of the Auto Pact, and competitive Canadian assembly costs. Canadian plants, as profit centres on the production side, are more profitable than their U.S. counterparts, due to the more reliable Class 8 market, lower debt burdens and greater economy and efficiency associated with producing one model of vehicle.

Competitive assembly costs have also been important for the off-highway sub-sector where assembly may take longer than 200 hours. In addition, Export Development Corporation (EDC) export financing, and Canadian International Development Agency (CIDA) aid programs facilitate export sales of trucks to developing countries, since most of the customers are governments and comparable financing is available to offshore competitors.

The major weakness of the Canadian on- and off-highway truck industry is that it lacks significant product research and development (R&D) capabilities. This is a result of foreign ownership and a lack of sufficient economies of scale. These same factors also inhibit the adoption of more efficient and innovative production technologies involving automation, robotics and computer-aided design.

Canada's relatively low volume of production has resulted in a lack of capacity to manufacture major components. While heavy-duty truck assemblers are able to source body, frame, driveline and suspension parts in Canada, all diesel engines, transmissions and systems are imported from the United States. This has meant that, despite meeting Auto Pact performance requirements on a corporate basis, the truck industry from time to time has difficulty in meeting EDC's and CIDA's "in-vehicle" Canadian-content threshold in order to be eligible for export financing under their programs.

Trade-related Factors

Canada produces highly competitive on- and off-highway vehicles which have been holding their own in North America, despite the growing competition from European and Japanese vehicles. The Canadian Most Favoured Nation (MFN) tariff of 9.2 percent provides local manufacturers with a degree of protection and encourages participation under the Auto Pact. The U.S. tariff is 25 percent, although vehicles produced in Canada enter duty-free if they meet the Auto Pact rule of origin (50 percent).



European tariff and non-tariff barriers are of little relevance to Canadian companies because there are few, if any, sales opportunities on the Continent. Canadian heavy-duty trucks are generally too large for European highways and there is a scarcity of resource-based projects requiring heavy-duty off-highway haulers.

Under the Canada-U.S. Free Trade Agreement (FTA), bilateral tariffs on vehicles and original equipment parts will be eliminated over 10 years and aftermarket parts over five years. Canadian provisions of the Auto Pact remain unchanged, although only those companies listed in the FTA will be able to participate. Companies participating in Canada must continue to meet Auto Pact performance requirements to retain eligibility for duty-free imports from third countries after bilateral tariffs are phased out. Under the FTA, vehicles and parts exported to the United States will be required to meet a new 50-percent North American rule of origin which is higher than the current U.S. Auto Pact requirement. This will encourage increased parts sourcing and provide opportunities for North American parts suppliers.

The FTA will also remove the restrictions on the importation of used trucks into Canada over a five-year period.

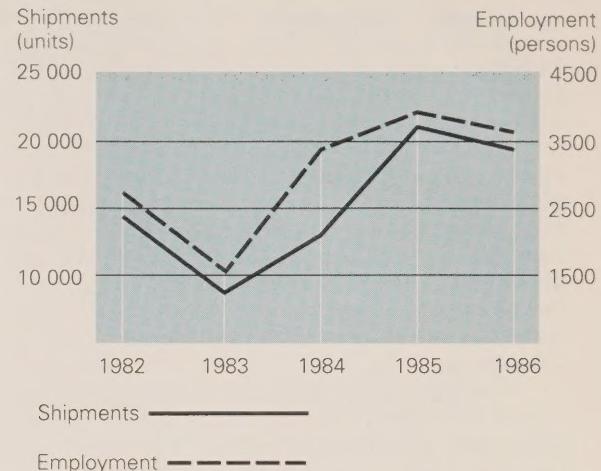
Technological Factors

Vehicle R&D is not carried out in Canada to any significant degree. This is primarily due to the fact that Canadian companies build-to-print and import most of the high-tech components.

The manufacture of power-train components for heavy trucks is concentrated in the United States. There is little incentive to manufacture such items in Canada as the broad range of variants required for Canadian production volumes are not sufficient to warrant the large capital investment that would be required. Although there is no capability in Canada for manufacturing diesel engines and transmissions, etc., for heavy-duty trucks, Canadian automotive parts producers are capable of providing other basic components.

Other Factors

Currency exchange rates and a high U.S. tariff have constrained Japanese and European direct exports of on-highway vehicles to North America. In order to minimize these effects, some overseas companies have begun to source trucks for the North American market from lower-cost producers such as Brazil.



Total Shipments and Employment

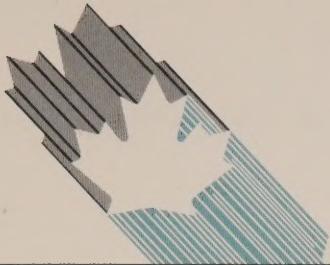
As well, the Canadian exchange rate with other currencies plays a significant role in the competitiveness of the off-highway sector. EDC financing is essential for successful bidding on overseas projects, including projects financed by the World Bank. Without the benefits of favourable exchange rates and export financing, Canadian off-highway hauler manufacturers would not be able to match foreign competition, which is increasing world market share through significantly lower wages and overheads, in addition to favourable financing packages.

3. Evolving Environment

The truck industry in North America is mature. It competes in a market which is also mature and only expected to grow at one or two percent per annum. In the case of off-highway haulers, while there may be an increase in demand in overseas markets, the debt problems of the developing countries will continue to constrain sales.

Weak demand and excess capacity globally have led to increased international competition in the North American market, and will likely be accompanied by highly competitive pricing, not only for the vehicles but also for components. Consequently, many companies are likely to experience low profitability. This will lead to further restrictions and continued implementation of cost-reduction measures.

The Canada-U.S. Free Trade Agreement is not expected to have a significant impact on the truck sector in the short to medium term. Performance in the long term will depend on the competitiveness of Canadian plants, the importance of multilateral benefits to individual producers under the Auto Pact and the demand for North American-type trucks.



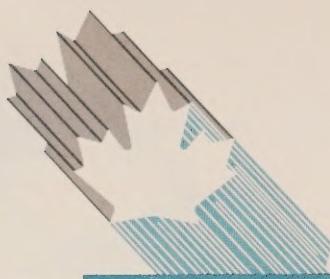
4. Competitiveness Assessment

In the present economic and regulatory environment, the Canadian on- and off-highway truck industry is competitive within its market niche. However, the North American industry is faced with excess capacity, and plants in Canada often produce models identical to those in the United States where production volumes are higher. In addition, European, Japanese and developing countries have targeted North America for market share growth. Consequently, as bilateral tariffs drop under the FTA, Canadian operations will have to demonstrate cost competitiveness and the importance of a Canadian location for responding to the specialized needs of the Canadian heavy-duty market. Continued access to export financing will remain an important factor when competing in export markets.

For further information concerning the subject matter contained in this profile, contact:

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Industry, Science and Technology Canada
Attention: On- and Off-Highway
Medium/Heavy-Duty Trucks
235 Queen Street
Ottawa, Ontario
K1A 0H5

(613) 954-3725



PRINCIPAL STATISTICS

SIC(s) COVERED: 3231 (1980)

On- and off-highway	1979	1982	1983	1984	1985	1986
Establishments	10	10	10	9	9	8
Employment	5 646	2 728	1 574	3 439	3 950	3 630
Shipments (\$ billions)	1.8	0.77	0.65	0.90	1.74	1.52
Shipments (units)	28 585	14 760	8 516	13 145	21 371	19 637

TRADE STATISTICS

On-highway only*	1979	1982	1983	1984	1985	1986
Shipments (units)	27 585	14 452	8 206	12 865	21 036	19 337
Exports (units)	14 617	8 032	6 201	7 382	11 790	10 430
Domestic shipments (units)	12 969	6 420	2 005	5 483	9 246	8 907
Imports (units)	8 617	4 454	2 718	6 048	8 062	8 668
Canadian market (units)	21 585	10 874	4 723	11 531	17 308	17 575
Exports as % of shipments	53	56	76	57	56	54
Imports as % of domestic market	40	41	57	52	47	49
On- and off-highway						
Source of imports (% of total value)		U.S.	E.C.	Asia	Others	
	1982	95	5	—	—	
	1983	95	5	—	—	
	1984	90	10	—	—	
	1985	90	10	—	—	
	1986	90	10	—	—	
On- and off-highway						
Destination of exports (% of total value)		U.S.	E.C.	Asia	Others	
	1982	90	—	5	5	
	1983	90	—	5	5	
	1984	90	—	10	—	
	1985	90	—	10	—	
	1986	90	—	10	—	

(continued)

REGIONAL DISTRIBUTION — Average over the last 3 years

	Atlantic	Quebec	Ontario	Prairies	B.C.
Establishments – % of total	—	10	60	—	30
Employment – % of total	—	17	51	—	32
Shipments – % of total	—	10	65	—	25

MAJOR FIRMS

Name	Ownership	Location of Major Plants
Freightliner of Canada Ltd.	American	Burnaby, British Columbia
Paccar Canada Ltd.	American	Ste-Thérèse, Quebec
Navistar International Corporation Canada	American	Chatham, Ontario
Mack Canada Inc.	American	Oakville, Ontario
Western Star Trucks Inc.	Canadian	Kelowna, British Columbia
Wabco Haulpack Division of Dresser Canada	American	Paris, Ontario
V.M.E. Equipment of Canada	American	Guelph, Ontario
Pacific Truck & Trailer Ltd.	British	Vancouver, British Columbia

*Detailed off-highway statistics are not available.



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Attautique	Québec	Ontario	Prairies	C.-B.
Etablissements (en %)	—	10	60	30
Emplois (en %)	—	17	51	32
Exportations (en %)	—	10	65	25
Nom	Propriéte	Emploiement		
Paccar Canada Ltd.	américaine	Sainte-Thérèse (Québec)		
Navistar International Corporation Canada	américaine	Chatham (Ontario)		
Mack Canada Inc.	américaine	Dakville (Ontario)		
Western Star Trucks Inc.	canadienne	Kelowna (C.-B.)		
Wabco Haulpack	américaine	Paris (Ontario)		
V.M.E. Equipment of Canada Ltd.	américaine	Guelph (Ontario)		
Pacific Truck & Trailor Ltd.	britannique	Vancouver (C.-B.)		
Les montants indiqués sont exprimés en milliards de dollars.				
** Des statistiques détaillées sur le sous-secteur des véhicules tous terrains ne sont pas disponibles.				

STATISTIQUES COMMERCIALES						
Transport routier et hors route						
1979	1982	1983	1984	1985	1986	
Etablissements	10	10	10	9	9	8
Emplois	5 646	2 728	1 574	3 439	3 950	3 630
Expéditions*	1,8	0,77	0,65	0,90	1,74	1,52
Expéditions (véhicules)	28 585	14 760	8 516	13 145	21 371	19 637
Transport routier seulement**	1979	1982	1983	1984	1985	1986
Transport routier et hors route						
Expéditions (véhicules)	27 585	14 452	8 206	12 865	21 036	19 337
Expéditions (véhicules)	14 617	8 032	6 201	7 382	11 790	10 430
Expéditions intérieures (véhicules)	12 969	6 420	2 005	5 483	9 246	8 907
Importations (véhicules)	8 617	4 454	2 718	6 048	8 062	8 668
Marché intérieur (véhicules)	21 585	10 874	4 723	11 531	17 308	17 575
Exportations (en % des expéditions)	53	56	76	57	56	54
Importations (en % du marché intérieur)	40	41	57	52	47	49
Transport routier et hors route (en % du marché intérieur)	40	41	57	52	47	49
Source des importations						
Transport routier et hors route (en %)						
Transport routier et hors route						
Destination des exportations						
Transport routier et hors route (en %)						
1982	90	—	5	5	5	5
1983	90	—	5	5	5	5
1984	90	—	10	10	10	—
1985	90	—	—	—	—	—
1986	90	—	—	—	—	—
1987	90	—	—	—	—	—
1988	90	—	—	—	—	—
1989	90	—	—	—	—	—
1990	90	—	—	—	—	—
1991	90	—	—	—	—	—
1992	90	—	—	—	—	—
1993	95	5	—	—	—	—
1994	95	5	—	—	—	—
1995	90	10	—	—	—	—
1996	90	10	—	—	—	—
1997	90	10	—	—	—	—
1998	90	10	—	—	—	—
1999	90	10	—	—	—	—
2000	90	10	—	—	—	—
2001	90	10	—	—	—	—
2002	90	10	—	—	—	—
2003	90	10	—	—	—	—
2004	90	10	—	—	—	—
2005	90	10	—	—	—	—
2006	90	10	—	—	—	—
2007	90	10	—	—	—	—
2008	90	10	—	—	—	—
2009	90	10	—	—	—	—
2010	90	10	—	—	—	—
2011	90	10	—	—	—	—
2012	90	10	—	—	—	—
2013	90	10	—	—	—	—
2014	90	10	—	—	—	—
2015	90	10	—	—	—	—
2016	90	10	—	—	—	—
2017	90	10	—	—	—	—
2018	90	10	—	—	—	—
2019	90	10	—	—	—	—
2020	90	10	—	—	—	—
2021	90	10	—	—	—	—
2022	90	10	—	—	—	—
2023	90	10	—	—	—	—
2024	90	10	—	—	—	—
2025	90	10	—	—	—	—
2026	90	10	—	—	—	—
2027	90	10	—	—	—	—
2028	90	10	—	—	—	—
2029	90	10	—	—	—	—
2030	90	10	—	—	—	—
2031	90	10	—	—	—	—
2032	90	10	—	—	—	—
2033	90	10	—	—	—	—
2034	90	10	—	—	—	—
2035	90	10	—	—	—	—
2036	90	10	—	—	—	—
2037	90	10	—	—	—	—
2038	90	10	—	—	—	—
2039	90	10	—	—	—	—
2040	90	10	—	—	—	—
2041	90	10	—	—	—	—
2042	90	10	—	—	—	—
2043	90	10	—	—	—	—
2044	90	10	—	—	—	—
2045	90	10	—	—	—	—
2046	90	10	—	—	—	—
2047	90	10	—	—	—	—
2048	90	10	—	—	—	—
2049	90	10	—	—	—	—
2050	90	10	—	—	—	—
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2052	90	10	—	—	—	—
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2057	90	10	—	—	—	—
2058	90	10	—	—	—	—
2059	90	10	—	—	—	—
2060	90	10	—	—	—	—
2061	90	10	—	—	—	—
2062	90	10	—	—	—	—
2063	90	10	—	—	—	—
2064	90	10	—	—	—	—
2065	90	10	—	—	—	—
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2067	90	10	—	—	—	—
2068	90	10	—	—	—	—
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2071	90	10	—	—	—	—
2072	90	10	—	—	—	—
2073	90	10	—	—	—	—
2074	90	10	—	—	—	—
2075	90	10	—	—	—	—
2076	90	10	—	—	—	—
2077	90	10	—	—	—	—
2078	90	10	—	—	—	—
2079	90	10	—	—	—	—
2080	90	10	—	—	—	—
2081	90	10	—	—	—	—
2082	90	10	—	—	—	—
2083	90	10	—	—	—	—
2084	90	10	—	—	—	—
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2087	90	10	—	—	—	—
2088	90	10	—	—	—	—
2089	90	10	—	—	—	—
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2091	90	10	—	—	—	—
2092	90	10	—	—	—	—
2093	90	10	—	—	—	—
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2099	90	10	—	—	—	—
2000	90	10	—	—	—	—
2001	90	10	—	—	—	—
2002	90	10	—	—	—	—
2003	90	10	—	—	—	—
2004	90	10	—	—	—	—
2005	90	10	—	—	—	—
2006	90	10	—	—	—	—
2007	90	10	—	—	—	—
2008	90	10	—	—	—	—
2009	90	10	—	—	—	—
2010	90	10	—	—	—	—
2011	90	10	—	—	—	—
2012	90	10	—	—	—	—
2013	90	10	—	—	—	—
2014	90	10	—	—	—	—
2015	90	10	—	—	—	—
2016	90	10	—	—	—	—
2017	90	10	—	—	—	—
2018	90	10	—	—	—	—
2019	90	10	—	—	—	—
2020	90	10	—	—	—	—
2021	90	10	—	—	—	—
2022	90	10	—	—	—	—
2023	90	10	—	—	—	—
2024	90	10	—	—	—	—
2025	90	10	—	—	—	—
2026	90	10	—	—	—	—
2027	90	10	—	—	—	—
2028	90	10	—	—	—	—
2029	90	10	—	—	—	—
2030	90	10	—	—	—	—
2031	90	10	—	—	—	—
2032	90	10	—	—	—	—
2033	90	10	—	—	—	—
2034	90	10	—	—	—	—
2035	90	10	—	—	—	—
2036	90	10	—	—	—	—
2037	90	10	—	—	—	—
2038	90	10	—	—	—	—
2039	90	10	—	—	—	—
2040	90	10	—	—	—	—
2041	90	10	—	—	—	—
2042	90	10	—	—	—	—
2043	90	10	—	—	—	—
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2045	90	10	—	—	—	—
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2048	90	10	—	—	—	—
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2052	90	10	—	—	—	—
2053	90	10	—	—	—	—
2054	90	10	—	—	—	—
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2056	90	10	—	—	—	—
2057	90	10	—	—	—	—
2058	90	10	—	—	—	—
2059	90	10	—	—	—	—
2060	90	10	—	—	—	—
2061	90	10	—	—	—	—
2062	90	10	—	—	—	—
2063	90	10	—	—	—	—
2064	90	10	—	—	—	—
2065	90	10	—	—	—	—
2066	90	10	—	—	—	—
2067	90	10	—	—	—	—
2068	90	10	—	—	—	—
2069	90	10	—	—	—	—
2070	90	10	—	—	—	—
2071	90	10	—	—	—	—
2072	90	10	—	—	—	—
2073	90	10	—	—	—	—
2074	90	10	—	—	—	—
2075	90	10	—	—	—	—
2076	90	10	—	—	—	—
2077	90	10	—	—	—	—
2078	90	10	—	—	—	—
2079	90	10				

4. Evaluation de la compétitivité

Dans le contexte économique et législatif actuel, l'industrie canadienne des camions, des poids lourds et des véhicules tous terrains est confrontée à une concurrence accrue du marché. Cependant, l'industrie sur les marchés internationaux connaît une croissance importante, grâce aux efforts de marketing et de vente internationale. Les fabricants canadiens ont développé une gamme complète de camions et de véhicules utilitaires adaptés à diverses applications industrielles et commerciales. Ils sont reconnus pour leur qualité et leur durabilité, et sont largement utilisés dans les secteurs minier, forestier, agricole et urbain. L'industrie canadienne des camions et des véhicules utilitaires joue un rôle crucial dans l'économie nationale, en contribuant à la sécurité et à l'efficacité des opérations industrielles et commerciales.

Matériel du transport de surface et de machinerie
Industrie, Sciences et Technologie Canada
Objet : Camions, poids lourds
équipements tous terrains
235, rue Queen
Ottawa (Ontario)
K1A 0H5
Tél. : (613) 954-3725

L'industrie nord-américaine des camions est arrivée à maturité, tout comme le marché où elle livre concurrence; elle ne devrait donc connaître une croissance que de 1 à 2 p. 100 par an. Quant à la demande de véhicules tous terrains de roulage, elle pourrait augmenter sur les marchés étrangers, mais le lourd fardeau de la dette des pays en développement continuera à nuire aux ventes. La faible demande conjuguée à la capacité excedentaire de certains fabricants n'arrivera pas à faire oublier les difficultés rencontrées dans l'industrie automobile nord-américaine, ce qui pourrait entraîner une réduction des pertes commerciales et des mesures pour réduire davantage les coûts.

A court et à moyen terme, l'accord de libre-échange ne devrait pas avoir de répercussions importantes sur le secteur des camions. À long terme, le rendement sera fonction de la compétitivité des usines canadiennes, de l'importance des avantages multilatéraux garantis aux constructeurs en vertu du Pacte de l'automobile, et de la demande de camions nord-américains.

3. Evolution de l'environnement

Les taux de change canadien par rapport à d'autres devises sont aussi un facteur de la compétitivité du secteur des véhicules tout terain. Le financement essentiel pour l'intermédiaire de la SEE reste un élément essentiel pour obtenir des contrats outre-mer, y compris les projets financés par la Banque mondiale. Sans un taux de change favorable et le financement des exportations, les constructeurs canadiens de véhicules tous terrains ne pourraient pas soutenir la concurrence étrangère, qui accroît sa part du marché international grâce à des salaires et des générations beaucoup moins élevées, et bénéficier d'avantages tels que les financements.

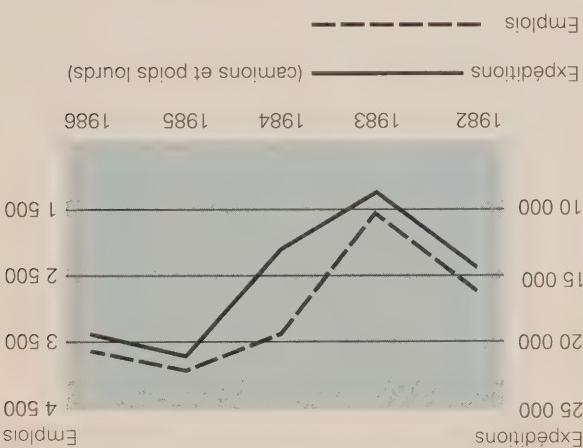
Les taux de change de même que les tarifs élèvent les importations par les Etats-Unis ont nui aux exportations directes japonaises et européennes de camions et de poids lourds sur le marché nord-américain. Pour remédier à cette situation, certaines sociétés étrangères ont commencé à fournir des camions au marché nord-américain par l'intermédiaire de constructeurs disposant de main-d'œuvre bon marché, comme c'est le cas au Brésil.

Autres facteurs

Le Canada ne mène pas d'importants travaux de R-D axes sur les véhicules, car les entreprises canadiennes offrent des produits prêts-à-monter et importent la plupart des composantes de pointe. La fabrication des organes de transmission pour poids lourds se faisait surtout aux États-Unis, les entreprises canadiennes hésitent à fabriquer ces composantes au Canada et donnent du travail à diverses régions pour rendre la production rentable une autre fois. Cependant, même si le Canada ne dispose pas des compétences pour fabriquer les moteurs diesels ou les organes de transmission pour les poids lourds, les fabricants canadiens pour les véhicules automobiles peuvent fournir les autres composantes de base.

Facteurs technologiques

L'accord prévoit également la suppression des contrôles pour l'importation au Canada de camions d'occasion et ce, dès 5 ans.



Les barrières européennes douanières et non douanières n'influencent guère sur les entreprises canadiennes, car les débouchés sur le marché européen sont à peu près inexistant. En général, des poids lourds fabriqués au Canada sont trop grands pour les routes européennes qui peu de grands projets d'exploitation des ressources requiertent des poids lourds tous terrains.

En vertu de l'Accord de libre-échange entre le Canada et les États-Unis, les tarifs bilatéraux en vigueur sur les véhicules et les pièces d'origine seront éliminés d'ici 10 ans et les tarifs sur les pièces de rechange le seront d'ici 5 ans. Les dispositions canadiennes du Pacte de l'automobile restent en vigueur, mais seules les sociétés agréées en vertu de l'Accord pourront s'en prévaloir.

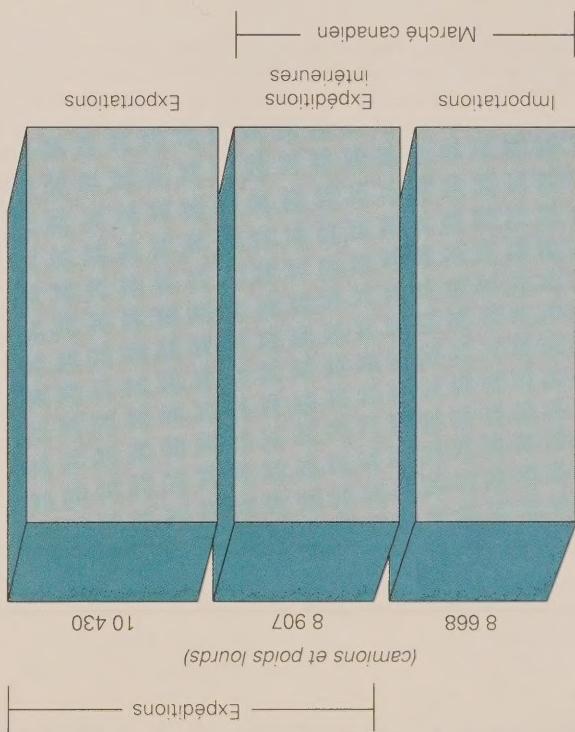
Ces sociétés seront tenues de se conformer aux normes provisoires établies dans le Pacte pour prévention des pratiques aussi les transferts bilatéraux éliminées. L'accord prévoit aussi que les véhicules et les pièces exportées aux États-Unis seront régis par une nouvelle règle d'origine établie dans la partie 50 b. 100 de l'accord pour les fournisseurs nord-américains.

Le contenu nord-américain, norme plus stricte que les dispositions actuelles du Pacte. Cette norme devrait faciliter l'approvisionnement en pièces et créer des nouvelles règles d'origine établies dans la partie 50 b. 100 du Pacte.

Facteurs liés au comblement

En raison de son faible taux de production, cette industrie ne dispose pas des compétences pour fabriquer les grandes compositions. Ainsi, les constructeurs de poids lourds se procurent au Canada la carrosserie, le chassis, la direction et les organes de suspension, mais doivent importer des Etats-Unis les moteurs diesels, les systèmes d'embraiyage et les organes de transmission. Par conséquent, même si elles respectent les normes de rendement stipulées dans le Projet, ces entreprises éprouvent parfois de la difficulté à atteindre les seuils de contenu canadien établis pour les véhicules, pour être admissibles aux programmes de financement des exportations de la SEE et de l'ACDI.

1988 - importations, exportations et expéditions intérieures.



* Estimations d'ISTC.



L'industrie canadienne des camions et des poids lourds regroupe les véhicules de transport routier ou porteur de marchandises dans le montage des cabines et des châssis de constructeurs spécialisés dans la construction de tous terrains de rouage utilisées par l'industrie de la construction de même que dans les industries minières et forestière, ainsi que des véhicules à usage particulier, telles les bennes, les constructeurs de remorques et de carrosseries, industrielles utilisées pour l'industrie de la construction de même que dans les usages spéciaux.

Structure

1. Structure et rendement

- les véhicules à usages spéciaux.
- les pneus et les chambres à air.
- les pièces d'automobile.
- les automobiles
- les autobus

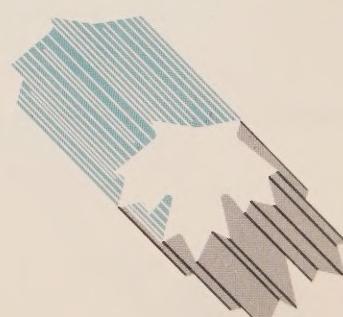
comprendant :

Cette industrie emploie près de 148 800* personnes, dont 49 800 étaient affectées au montage des automobiles, des camions et des autobus, 16 600* à la construction des camions, des camions et des autobus, 68 400 à la fabrication de pièces et 14 000* à la fabrication de usages spéciaux et plus de 1,8 milliard* pour les pneus et les chambres à air. Ces dernières sont 25,1 milliards pour le montage automobile atteignant presque 41 milliards de dollars*, soit 2,2 milliards pour les pièces, 1,8 milliard* pour les véhicules d'autobus, 1,2 milliards pour les pneus, et camions à 100 des exportations — produits manufacturés et produits finis — vers les États-Unis. En 1986, ce large éventail d'activités représentait environ 16 p. 100 des expéditions canadiennes de produits manufacturés et quelque 44 p. 100 des véhicules automobiles — voitures, camions, autobus et véhicules à usages textiles, verre et produits chimiques.

Véhicules automobiles — voitures, camions, autobus et véhicules à usages spéciaux — ainsi que les fabricants de pièces détachées, y compris les pneus et les chambres à air, d'origine ou de rechange. Au Canada, la production de véhicules automobiles est directement liée aux secteurs suivants : fer et acier, métal usiné, alliages d'aluminium, caoutchouc, plastiques,

textiles, verre et produits chimiques.

L'industrie canadienne de l'automobile regroupe les constructeurs de



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Alberta

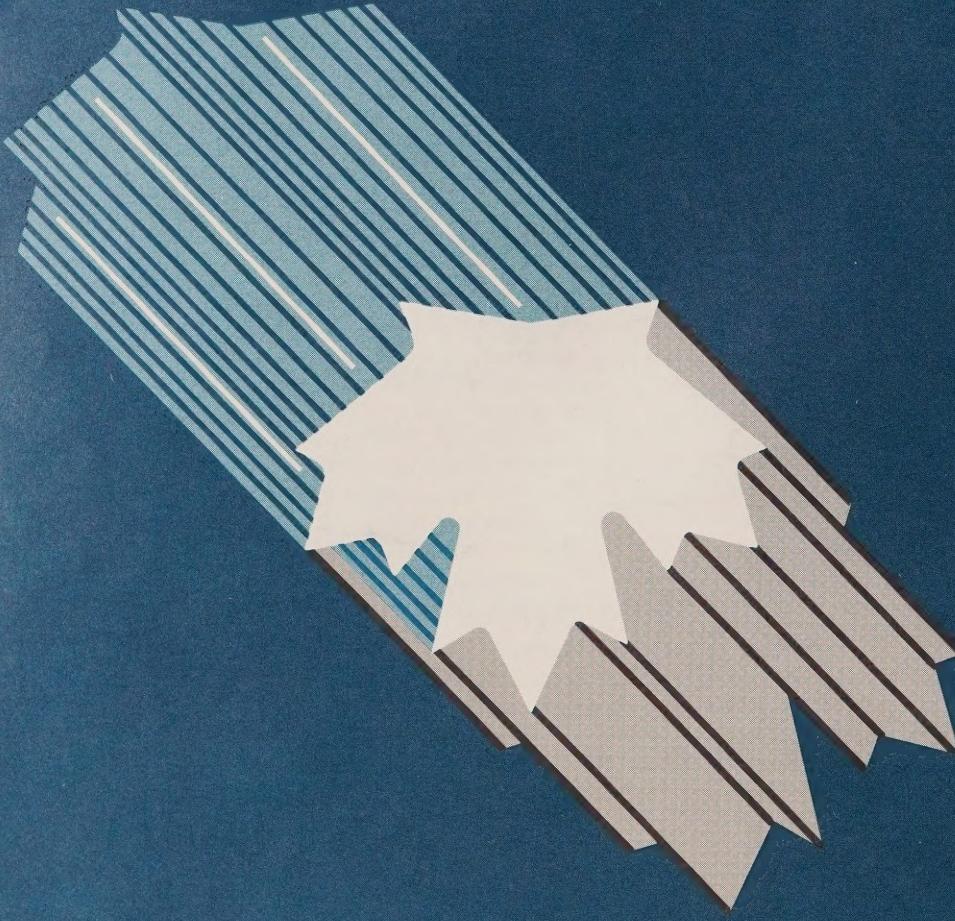
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